

***AESDIRECT***  
**ACCOUNT ADMINISTRATION USER GUIDE**

Updated June 24, 2014

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## OVERVIEW

### *AESDirect Roles Defined*

Each *AESDirect* Account includes three distinct types of Users, each with their own role to play in filing and their own set of responsibilities.

This Administrative Guide was created to help the Account Administrator and the User Manager understand fully their role in *AESDirect*. Those who file EEI directly may look to the ***AESDirect* User Guide** to fully understand that set of responsibilities.

### **Account Administrator**

The Account Administrator is responsible for the *AESDirect* account and should be a Customs Compliance specialists and a company officer.

An Account Administrator's responsibilities include:

Interacting with *AESDirect* Technical Support - If there are changes to be made to your *AESDirect* Account which require interaction with *AESDirect* Technical Support, the Account Administrator must be the initiating party. The Account Administrator must be the signatory on all documents requesting any substantial change to an account.

Creating and Managing User Managers – The Account Administrator can create up to two User Managers to help in the day-to-day management of traditional *AESDirect* Users.

Creating and Managing Users - The Account Administrator, as the first User in *AESDirect*, is responsible for creating Users, providing those Users a Password and managing their access to your *AESDirect* Account, by manually resetting passwords or disabling accounts, when necessary. The Account Administrator may delegate this responsibility to a User Manager.

**THE ACCOUNT ADMINISTRATOR CANNOT FILE EEI UNDER THEIR USERNAME. THE ACCOUNT ADMINISTRATOR MAY CREATE A SEPARATE USERNAME, USED ONLY TO FILE EEI.**

### **User Managers**

A User Manager is an *AESDirect* expert. A User Manager serves as a point of contact for those who wish to use a company's *AESDirect* account. A User Manager can do everything an Account Administrator can, such as create Users and manage their access. User Managers cannot

act legally on behalf of the Account holder when contacting *AESDirect* or make any changes to the Account Profile.

Any new or existing User in your *AESDirect* Account can be a User Manager. Your Account is limited, however, to only two (2) User Managers.

**A USER MANAGER CANNOT FILE EEI UNDER THEIR USERNAME. USER MANAGERS MAY CREATE A SEPARATE USERNAME, USED ONLY TO FILE EEI.**

## **Users**

Users hold the most fundamental role in *AESDirect*. They are responsible for the day-to-day filing of EEI. Users may also be limited to viewing historical filing data.

**USERS CANNOT BE ACCOUNT ADMINISTRATORS OR USER MANAGERS.**

# AESDIRECT RULES

## ***Username Rules***

Each User in *AESDirect* must be assigned individual Username. To clearly identify each User and to provide equal access to all users, strict rules are in place for the creation of Usernames.

**Unique** - All *AESDirect* usernames must be unique across the *AESDirect* system, even between different companies. For example, Company ABC creates username 'JohnDoe.' Company XYZ cannot also create a 'JohnDoe.' They may, however, create a version of this username, such as 'JohnDoe123' if available.

**Complex** – Usernames must be alpha-numeric and between 3 and 25 characters long

**Usernames are Not Case Sensitive**

**One Life Only** – Once a username is created, it is permanently assigned to the company that created it, even if the user moves to a new company.

## ***Password Rules***

*AESDirect* Password Rules are strictly enforced, in this case, to maximize security. Common words and phrases are not acceptable.

**Complex** – All passwords must be at least 12 characters long and contain characters from 3 of the following 4 groups:

- Lowercase letters
- Uppercase letters
- Numbers
- Non-alphanumeric characters (!, \$, #, % );

At least 6 of those characters may occur only once in the password

**Unique** – Passwords cannot contain any familiar words or sequential character strings. They must also vary significantly each time they are reset.

- Passwords cannot contain any string that is also contained in the username
- Passwords cannot contain any dictionary words
- Passwords cannot contain any common strings such as
  - A sequential series of letters (e.g. abcd)

- A sequential series of numbers (e.g. 1234) or pattern of numbers (e.g. 2468)
- Password must be unique for 4 years
- Passwords must be unique within the last 24 passwords

**Temporal** - Passwords on standard User accounts will expire every 60 days. Each new Password must meet the above parameters. You will be notified each time you login of the number of days remaining until your password expires.

Passwords cannot be changed more than once per day.

## ***Session Rules***

Every time you log in to *AESDirect*, a timer is activated. This timer serves both as a session regulator and an activity counter. To improve security, User Accounts may only be inactive for a finite amount of time, whether for an individual session, or the accounts lifespan.

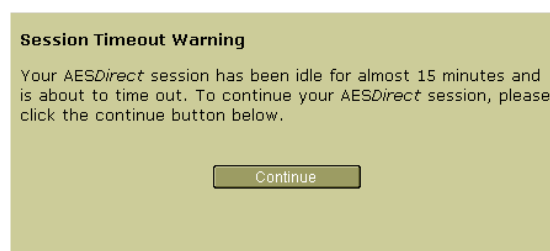
### **Account Inactivity**

- Accounts will be deactivated if they have not been accessed by any Users in 30 days.
- Once deactivated, the Account Administrator will need to contact AESDirect Technical Support to have the Account reactivated.

### **User Inactivity**

- Users will be deactivated if they have not logged in for more than 30 days.
- E-mail warnings will be delivered to the User once a day after 25 days of inactivity. The E-Mail will remind of the need to change their password and direct them to the appropriate resources.
- Once deactivated, the Account Administrator or User Manager will need to reactivate the User

### **Session Timeout**



- All *AESDirect* User sessions will time-out after 15 minutes of inactivity. A pop-up will notify a User 5 minutes before time-out.

- Actions, such as opening a window or moving from one page to another, will reset the 30 minute timer
- Once inactive for more than 15 minutes, the User will be forced to log in again. All data that was not saved before the timeout will be lost

## Concurrent Sessions

- Each Username can be used for up to five simultaneous sessions. That is, a user can login to five different computers, or five different types of web browsers on one machine, at the same time.
- The sixth session attempt will fail. The attempt will be logged.

## Lockout

**\*\*WARNING\*\*WARNING\*\*WARNING\*\*WARNING\*\*WARNING\*\***

Enter your username and password and click **Continue**

[Home](#) [Who is My Administrator?](#)  
[Need Help?](#) [Forgot Your Password?](#)

**Username:** johnsmith1975  
**Password:** ●●●●●●●●

**No user account found for the username and password entered**

*Please remember that passwords are case sensitive. For users that have upgraded to the new account administration tools, 5 consecutive invalid login attempts will result in your username being locked out. Contact your Account Administrator or a User Manager if you need assistance or reset your password by using the "Forgot your password?" link above.*

- After 5 consecutive, invalid login attempts within 15 minutes the User will be locked out
- The locked out User can only be reactivated by the Account Administrator and only 15 minutes after the final failed login attempt

## REGISTER FOR AESDIRECT

The Account Administrator is responsible for registering a company or individual's AESDirect account. The steps below walk the Account Administrator through the process of creating their access to AESDirect, registering as an AES filers and creating the first Filer User.

NOTE: When creating your AESDirect account, you will be asked to create two, separate Users: the Account Administrator user; and a Filing User. The Usernames must be different. In order to ensure the safety of your Personally Identifiable Information and to reduce the possibility that your account is misused, the Account Administrator user can not directly file EEI. Only Filer users, with no access to Administrative permissions, may file EEI.

To Register for AESDirect

### ***Step 1: Register Your Company and Account Administrator***

1. Go to <https://aesdirect.census.gov>
2. Under Account Set-up & Management, click 'Register New Account'

The 'Register for AESDirect' screen will open

3. Enter your Company Information
  - a. Enter the Company Name
  - b. Enter your Filer ID Number
  - c. Select the Filer ID Number qualifier from the dropdown men. Choose either:
    - Employer Identification Number (Company Tax ID); or
    - DUNS Number
  - d. If you selected 'DUNS Number' for Filer ID, please enter an IRS Number
  - e. Select EIN from the IRS ID Type qualifier dropdown menu.
4. Enter your Account Administrator details
  - a. Enter the full Account Administrator Name (First Name, Middle Initial, Last Name)
  - b. Enter the Account Administrator's Phone Number

- c. Enter the Account Administrator's Fax Number
  - d. Enter the Account Administrator's Email Address
  - e. Re-enter the Account Administrator's Email Address to confirm
  - f. Click the checkbox to confirm that this individual acknowledges the responsibilities as the Account Administrator for your organization.
5. Enter the Administrator Address
- a. Enter Address 1
  - b. Enter Address 2, if available
  - c. Enter the City
  - d. Select the State from the dropdown menu
  - e. Select the Country from the dropdown menu
6. Enter your Corporate Office address
- a. If Corporate Office is listed at the same location as the Account Administrator address above, click the checkbox and continue to the next section. Otherwise:
  - b. Enter Address 1
  - c. Enter Address 2, if available
  - d. Enter the City
  - e. Select the State from the dropdown menu
  - f. Select the Country from the dropdown menu
7. Enter the Corporate Contact information
- a. If Corporate Contact is the same person as the Account Administrator, click the checkbox and continue to the next section. Otherwise:
  - b. Enter the Corporate Contact Name
  - c. Enter the Corporate Contact Phone Number
  - d. Enter the Corporate Contact Fax Number

- e. Enter the Corporate Contact Email Address
- f. Re-enter the Corporate Contact Email Address to confirm
- 8. Click the checkbox to certify that the information you have entered in this fields is true and correct.
- 9. Click the checkbox to confirm that you have both read and agree to the Terms and Conditions governing the use of AESDirect.
- 10. Please read the Notice in blue in its entirety.
- 11. Once read, click 'Submit AESDirect Registration.'

If you have filled in all fields correctly, your AESDirect Registration will be processed. When processing is complete, AESDirect will send a confirmation email to the email address listed for the Account Administrator. This may take up to three hours. If you have not confirmation within three hours, please contact AESDirect Technical Support.

### ***Step 2: Confirm Registration***

- 1. Read confirmation email

AESDirect will send a confirmation email to the email address listed for the Account Administrator when your registration has been processed. This may take up to three hours. If you have not confirmation within three hours, please contact AESDirect Technical Support.

- 2. Click confirmation link

There will be a link within the body of the confirmation email. You may click that link, or copy and paste that link into the web address field on your web browser and click 'Enter' on your keyboard. This will both confirm for AESDirect that your email address is legitimate and that you intend to continue with Step 3.

### ***Step 3: Create Account Administrator User***

The Account Administrator User is responsible for management of your AESDirect Account and the creation of User Managers and filing Users.. The Account Administrator User cannot manage EEI. You will be able to create your first Filing User in Step 4.

- 1. Choose a Username.

Follow the rules set in this document to choose a Username for the Account Administrator. Only the Account Administrator may use this Username to access AESDirect. The Account Administrator Username must not be shared with other members or your organization.

2. Choose a Password

Follow the rules set in this document to choose a secure Password for the Account Administrator User.

- a. Enter the Password
- b. Re-enter the Password to Verify

3. When finished, click 'Create Username and Password'

If your Username and Password meet system requirements, they will be created. Make sure you remember your Account Administrator login credentials.

### ***Step 4: Create First Filing User***

As a companion to the Account Administrator User, the first Filing User is to be used only to file EEL. The Filing User cannot be a User Manager. If the Filing User is assigned the User Manager permission or the Account Administrator role is transferred to the Filing User, it will lose permission to file EEL.

1. Choose a Username.

Follow the rules set in this document to choose a Username.

2. Choose a Password

Follow the rules set in this document to choose a secure Password for the Account Administrator User.

- a. Enter the Password.
- b. Re-enter the Password to Verify

3. When finished, click 'Create Username and Password'

If your Username and Password meet system requirements, they will be created. Make sure you remember your Filing User login credentials.

### ***Step 5: Download and Review User Guide and Sample Shipments***

To ensure that you and your users can correctly and accurately create an EEI, each applicant is required to complete the Certification Quiz. To properly prepare your organization for this quiz, you must download the filing User Guide and Sample Shipments. Once you have reviewed these documents in detail, you may continue on to Step 6.

You will not be able to file an EEI until you have completed the Certification Quiz.

### ***Step 6: Take Certification Quiz***

The Certification Quiz is composed of 30 multiple choice questions. You may take this quiz as many times as necessary to pass. You will not be able to file an EEI until you have completed the Certification Quiz.

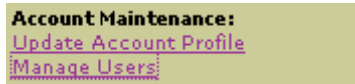
To take the quiz, click ‘Click here to begin you quiz.’

You will be prompted to log in. To take the quiz you need to use the Filing User username that you created in Step 4.

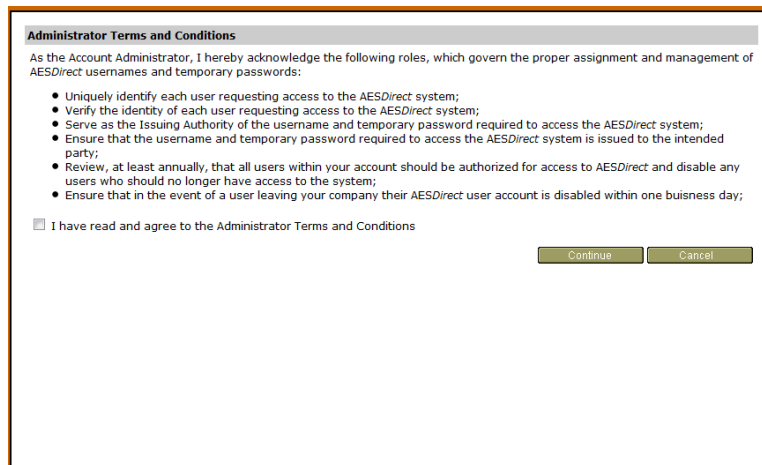
## THE MANAGE USERS FUNCTIONS

Account Administrators and Users Managers have access to the **Manage Users** screen and will see the link to those functions on the *AESDirect* interface.

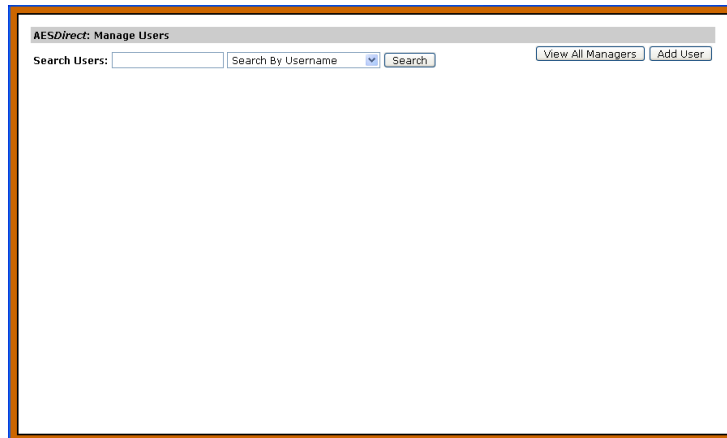
To access the Manage User Functions



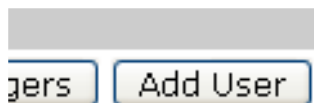
1. Under **Account Maintenance**, click 'Manage Users'

A screenshot of a dialog box titled "Administrator Terms and Conditions". The text inside reads: "As the Account Administrator, I hereby acknowledge the following roles, which govern the proper assignment and management of AESDirect usernames and temporary passwords:". Below this is a bulleted list of five responsibilities: 1. Uniquely identify each user requesting access to the AESDirect system; 2. Verify the identity of each user requesting access to the AESDirect system; 3. Serve as the Issuing Authority of the username and temporary password required to access the AESDirect system; 4. Ensure that the username and temporary password required to access the AESDirect system is issued to the intended party; 5. Review, at least annually, that all users within your account should be authorized for access to AESDirect and disable any users who should no longer have access to the system; 6. Ensure that in the event of a user leaving your company their AESDirect user account is disabled within one business day; Below the list is a checkbox labeled "I have read and agree to the Administrator Terms and Conditions". At the bottom right are two buttons: "Continue" and "Cancel".

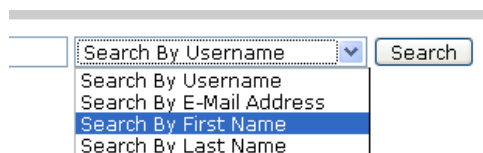
2. If this is the first time you are accessing these functions, you will be asked to confirm the **Administrator Terms and Conditions**.
3. Check the box to acknowledge you have read and understood the Administrator Terms and Conditions.
4. Click 'Continue.'



5. You will be brought to the **AESDirect: Manage Users** screen. From the **AESDirect: Manage Users** screen, you may add new Users as well as search for and modify existing Users.



6. Click 'Add User' to create a new User. Creating a User is as straight forward as filling in their information, choosing their permissions and then delivering their Username and Password.



7. Account Administrators can search for existing Users by one of these criteria:
  - Username
  - E-Mail Address
  - First Name
  - Last Name
8. Enter at least the first character of the search term and click 'Search' to return a list of matches.

Username	Quiz	App	Mgr	Admin	First Name	Last Name	E-Mail Address	Expiration
test005	<a href="#">Edit</a>   <a href="#">Disable</a>   <a href="#">Reset Password</a>	Y	Y	Y	luba		l@l.com	12/14/2008
test006	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED			l@l.com	-
test007	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	test		l@l.com	-
test100	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	gh		l@l.com	-
test1001	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	LUBA		l@l.com	-
test1002	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	luba		l@l.com	-
test1003	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	luba		l@l.com	-
test1004	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	lu		l@l.com	-
test1005	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	luba		l@l.com	-
test1006	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	luba		l@l.com	-
test1007	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	ll		l@l.com	-
test101	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	test		l@l.com	-
test1010	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	luba		l@oo.com	-
test1011	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	luu		w@w.com	-
test1012	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	l		l@l.com	-
test1013	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	luba		te@te.com	-
test102	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED			l@l.com	-
test103	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED			l@l.com	-
test104	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED			l@l.com	-
test201	<a href="#">Reactivate</a>   <a href="#">View Log</a>			DISABLED	luba		ww@ww.com	-

Easily identify the current status of a User, including their permissions or if they have been Disabled or Locked Out.

Sort the list of Users by clicking a highlighted column name, such as **Username**, **First Name**, **Last Name** and **E-Mail Address**.

## HOW TO...

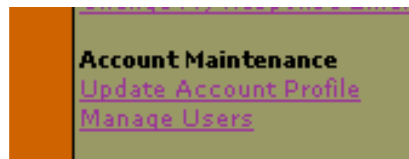
This section will help guide you through the step-by-step process of completing each administrative task in *AESDirect*.

### ***Create a New User***

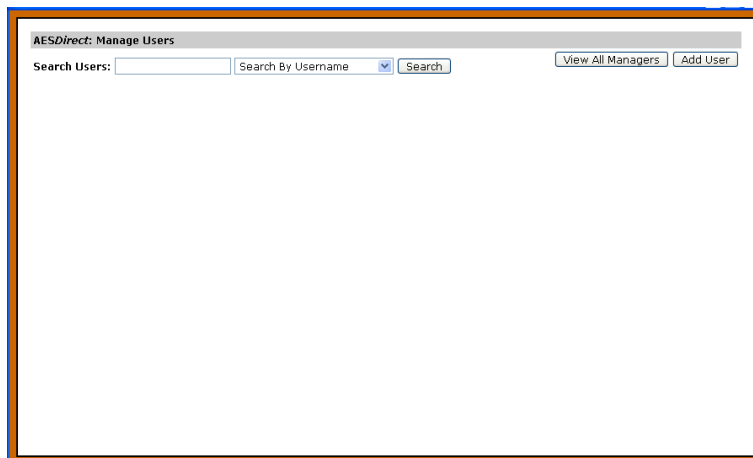
Users are the backbone of the *AESDirect* filing experience. Anyone who accesses *AESDirect* is a User. Users access the system with a Username and a Password to perform the tasks to which they are assigned. Usernames must be 3-25 characters in length. Passwords for Users expire every 60 days.

To create a New User...

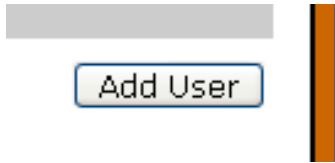
Login to *AESDirect*



1. Under **Account Maintenance**, Click 'Manage Users'



The **AESDirect: Manage Users** screen will open



2. Click the 'Add User' button

A screenshot of a web form titled 'AESDirect: Add User'. The form has a light grey header bar with the title. Below the header, there are four text input fields labeled 'Username:', 'First Name:', 'Last Name:', and 'E-Mail Address:'. Below these fields is a section titled 'This User Should be Able To:' with three radio button options: 'File EEI (This includes editing, resubmitting, and canceling EEI)', 'View EEI (For Internal Company Use ONLY)', and 'Manage Users (Create, modify, disable, and re-enable users)'. Below this is another section titled 'For users that can file EEI, should the user be required to take the certification quiz before filing?' with two radio button options: 'Yes - Require this user to pass the AESDirect certification quiz before accessing the AESDirect application. This is recommended for users who will have full access to the application.' and 'No - This user can access the AESDirect application immediately without passing the AESDirect certification quiz.' At the bottom of the form are two buttons: 'Cancel and return to user list' on the left and 'Save User' on the right.

The **AESDirect: Add User** screen will open

3. Enter a Username

The Username must be unique to *AESDirect*. If the Username already exists, you will be notified and given a chance to choose another Username.

4. Enter the User's First Name

5. Enter the User's Last Name

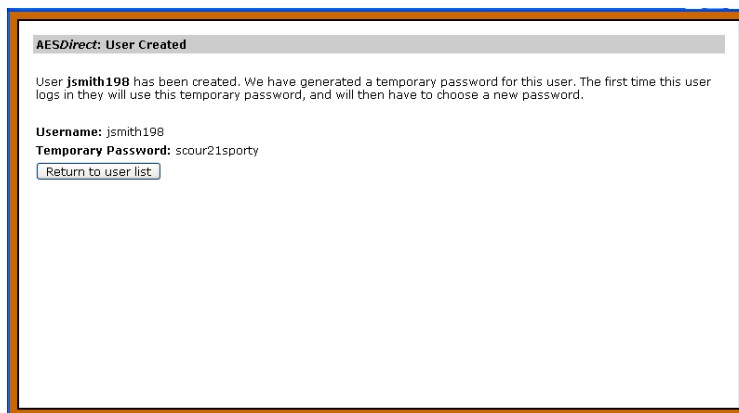
6. Enter the User's E-Mail Address

7. Choose the Users Role under **This User Should be Able To:**

- File EEI – This User will be able to Create and Edit EEI
- View EEI – This User will only be able to View EEI. They will not be able to make any changes or create new EEI.
- Manage Users – A User Manager cannot file EEI, but she can create and manage Filing Users.

**Note:** Each AESDirect account is only allowed two (2) User Managers. If this checkbox is grayed out, you have already selected two User Managers. Questions about the number of User Managers you may create should be directed to AESDirect Technical Support.

8. If you select 'File EEI' above, you must also choose whether the User should take the certification quiz.
  - Choose 'Yes' if you want to require the User to take and pass the *AESDirect* Certification Quiz before accessing the *AESDirect* application. This is highly recommended.
  - Choose 'No' if you do NOT want to require the user to take and pass the *AESDirect* Certification Quiz before accessing the *AESDirect* application.
9. When you are finished, click 'Save Users.'



10. You will be brought to the **User Created** screen. The Username will be displayed and a temporary password assigned
11. Provide this information to the User by email or, preferably, telephone.

The screenshot shows the AESDirect login interface. At the top, there are two circular logos: the U.S. Department of Commerce on the left and the AES logo on the right. The title "AESDirect" is prominently displayed in a large, stylized font, with the tagline "Reduce Exporting Stress with AES" underneath it. Below the title, a series of asterisks and the word "WARNING" are repeated. A paragraph of text follows, stating that this is a Census Bureau computer system and that all data is owned by the Census Bureau. It also mentions that the system is monitored and that any unauthorized use is a violation of federal law. Another series of asterisks and "WARNING" text is shown. Below this, a section titled "Your Password Has Expired" informs the user that they need to change their password before logging in. It provides two options: "Change Password" (which is highlighted in green) and "Cancel".

When the User first logs in to their account, they will be forced to change their password

The screenshot shows the "Change Password for User" form. The title "Change Password for User: rpedersen" is at the top. Below it, a message states: "Password cannot contain any dictionary words and it must meet the following criterias:". A list of five requirements follows, each preceded by a red 'X' icon:
 

- Password must be 12 characters long
- At least 1 character must be alphabetical AND at least 1 character must be a digit OR a non-alphanumeric character
- At least 6 characters must occur only once in a password
- Passwords cannot contain any string that is also contained in the username
- Passwords cannot contain any common strings such as a sequential series of letters (abcd) or a sequential series of numbers (1234) or pattern of numbers (2468)

 Below the list, there are three input fields: "Old Password:" (filled with dots), "New Password:", and "Confirm New Password:". At the bottom, there are two buttons: "Continue" (highlighted in green) and "Cancel".

12. Users must enter the provided password in the 'Old Password' field.

13. All passwords must be at least 12 characters long and contain characters from 3 of these 4 groups:

- Lowercase Letters
- Uppercase Letters
- Numbers
- Special Characters: ! # \$ %

- At least 6 of those characters may occur only once in the password

Please reference the **Password Rules** of this document for all password parameters.

**Change Password for User: rpedersen**

Password cannot contain any dictionary words and it must meet the following criterias:

- ✓ Password must be 12 characters long
- ✓ At least 1 character must be alphabetical AND at least 1 character must be a digit OR a non-alphanumeric character
- ✓ At least 6 characters must occur only once in a password
- ✓ Passwords cannot contain any string that is also contained in the username
- ✓ Passwords cannot contain any common strings such as a sequential series of letters (abcd) or a sequential series of numbers (1234) or pattern of numbers (2468)

Old Password:

New Password:  ✓

Confirm New Password:  ✓

AESDirect will validate the password as the User creates it.

**Updating Password...**

**Success:** Your password has been updated.

Once the Users have successfully updated their password they will have access to the *AESDirect* functions you have granted to them.

## ***Create a User Manager***

The role of a User Manager is very similar to that of the Account Administrator.

A User Manager can serve as a point of contact for Users, and help:

- Establish new *AESDirect* Users
- Make changes to existing Users
- Reset passwords or reactivate disabled Users

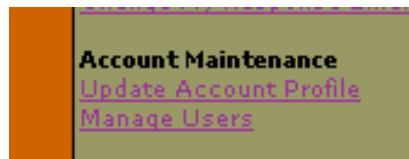
A User Manager is an *AESDirect* expert.

A User Manager may not do is act legally on behalf of the Account holder when contacting *AESDirect*. Additionally, a User Manager may not File or Manage EEI.

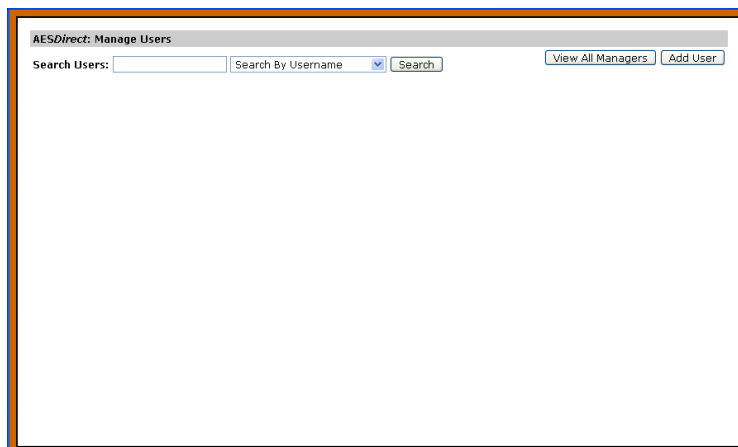
A User Manager can be a new or existing User. Your Company Account is limited, however, to only two (2) User Managers. Both the Account Administrator and a User Manager can create a User Manager.

To create a User Manager...

1. Login to *AESDirect*

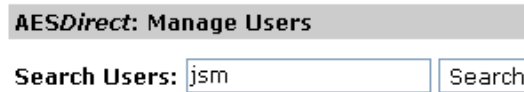


2. Under **Account Maintenance**, Click 'Manage Users'



The ***AESDirect: Manage Users*** screen will open

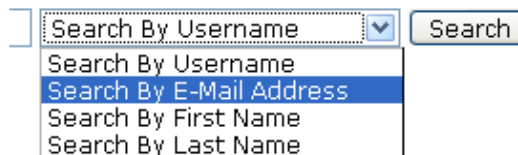
3. Either follow the instructions to Create a New User and give that User Manager Permission or search for an existing User



**AESDirect: Manage Users**

Search Users:

4. Enter at least one character of a search string



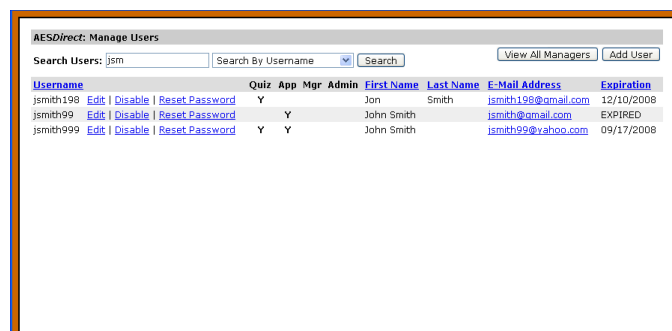
- Search By Username
- Search By E-Mail Address
- Search By First Name
- Search By Last Name

5. Choose how you will 'Search by...'

- Username
- E-Mail Address
- First Name
- Last Name

6. Click 'Search'

A list of matches will be returned



**AESDirect: Manage Users**

Search Users:  Search By

Username	Quiz	App	Mgr	Admin	First Name	Last Name	E-Mail Address	Expiration
jsmith198	<a href="#">Edit</a>   <a href="#">Disable</a>   <a href="#">Reset Password</a>	Y			Jon	Smith	<a href="mailto:jsmith198@gmail.com">jsmith198@gmail.com</a>	12/10/2008
jsmith99	<a href="#">Edit</a>   <a href="#">Disable</a>   <a href="#">Reset Password</a>		Y		John	Smith	<a href="mailto:jsmith@gmail.com">jsmith@gmail.com</a>	EXPIRED
jsmith999	<a href="#">Edit</a>   <a href="#">Disable</a>   <a href="#">Reset Password</a>	Y	Y		John	Smith	<a href="mailto:jsmith99@yahoo.com">jsmith99@yahoo.com</a>	09/17/2008

7. Click 'Edit' next to the Username you would like to Modify

**AESDirect: Add User**

Username:

First Name:

Last Name:

E-Mail Address:

**This User Should be Able To:**

- ☐ File EEI (This includes editing, resubmitting, and canceling EEI)
- ☐ View EEI (For Internal Company Use ONLY)
- ☒ Manage Users (Create, modify, disable, and re-enable users)

**For users that can file EEI, should the user be required to take the certification quiz before filing?**

- ☐ Yes - Require this user to pass the AESDirect certification quiz before accessing the AESDirect application. This is recommended for users who will have full access to the application.
- ☐ No - This user can access the AESDirect application immediately without passing the AESDirect certification quiz.

The **AESDirect: Edit User** screen will open

8. Select 'Manage Users'

**Note:** Each AESDirect account is only allowed two (2) User Managers. If this checkbox is grayed out, you have already selected two User Managers. Questions about the number of User Managers you may create should be directed to AESDirect Technical Support.

9. Click 'Save User'

Quiz	App	Mgr	Admin	First N
		Y		Eric
		Y		Eric

The screen will refresh. Next to the Username a 'Y' should appear in the **Mgr** column. The User is now a User Manager.

Administrator Terms and Conditions

As the Account Administrator, I hereby acknowledge the following roles, which govern the proper assignment and management of AESDirect usernames and temporary passwords:

- Uniquely identify each user requesting access to the AESDirect system;
- Verify the identity of each user requesting access to the AESDirect system;
- Serve as the Issuing Authority of the username and temporary password required to access the AESDirect system;
- Ensure that the username and temporary password required to access the AESDirect system is issued to the intended party;
- Review, at least annually, that all users within your account should be authorized for access to AESDirect and disable any users who should no longer have access to the system;
- Ensure that in the event of a user leaving your company their AESDirect user account is disabled within one business day;

☐ I have read and agree to the Administrator Terms and Conditions

Continue

Cancel

When the new User Manager accesses the Account Maintenance functions the first time, they will be asked to confirm the **Terms and Conditions**.

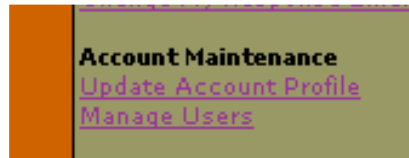
They must check the box to acknowledge that they have read and understand the Administrator Terms and Conditions, or they will not be able to access these functions.

## Reset Passwords

All Users forget their passwords. As an Account Administrator or a User Manager, it is your responsibility to reset these passwords. Resetting a Password is simple.

To reset a User's Password:

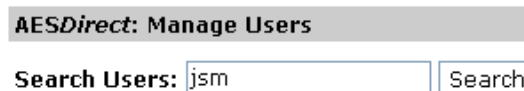
1. Login to *AESDirect*



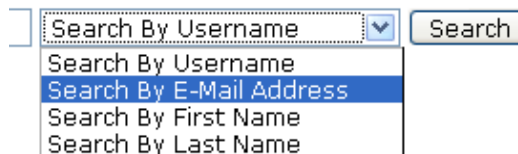
2. Under **Account Maintenance**, click 'Manage Users'

The **AESDirect: Manage Users** screen will open

3. Search for the User

A screenshot of a web form titled 'AESDirect: Manage Users' in a grey header bar. Below the header, the text 'Search Users:' is followed by a text input field containing the characters 'jsm'. To the right of the input field is a button labeled 'Search'.

- a. Enter at least the first character of a search string

A screenshot of a search dropdown menu. On the left is a small blue square icon. To its right is a dropdown menu with a light blue border. The menu is currently open, showing a list of search criteria: 'Search By Username', 'Search By E-Mail Address' (which is highlighted with a blue background), 'Search By First Name', and 'Search By Last Name'. To the right of the dropdown menu is a button labeled 'Search'.

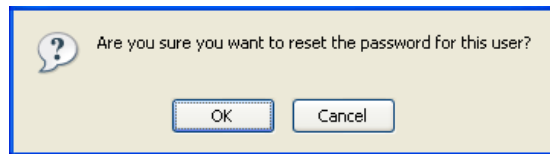
- b. Choose how you will 'Search by...'

- Username
- E-Mail Address
- First Name
- Last Name

- c. Click 'Search'

Username				Qu
jsmith198	<a href="#">Edit</a>	<a href="#">Disable</a>	<a href="#">Reset Password</a>	1
jsmith99	<a href="#">Edit</a>	<a href="#">Disable</a>	<a href="#">Reset Password</a>	1
jsmith999	<a href="#">Edit</a>	<a href="#">Disable</a>	<a href="#">Reset Password</a>	1

4. A list of matches will be returned
5. Click 'Reset Password' next to the Username you would like to update



A box will open and ask you to confirm that you would like to reset the User's password

6. Click 'OK'



A new window will open. The password will be reset and a new temporary password displayed

7. Deliver this password directly to the User by email or, preferably, telephone.

The screenshot shows the AESDirect login interface. At the top, there are two circular logos: the U.S. Department of Commerce on the left and the AES logo on the right. The title "AESDirect" is prominently displayed in a large, stylized font, with the tagline "Reduce Exporting Stress with AES" underneath it. Below the title, a series of five "WARNING" messages are displayed in a grey box. The main body of the page contains a detailed disclaimer about the system being a Census Bureau computer system, followed by another series of five "WARNING" messages. A section titled "Your Password Has Expired" informs the user that they need to change their password before logging in. It provides two options: "Change Password" (a green button) and "Cancel" (a grey button).

When the User attempts to login, they will be forced to change their password

The screenshot shows the "Change Password for User" form for the user "rpedersen". The form is titled "Change Password for User: rpedersen" and includes a list of password requirements, each preceded by a red 'X' icon. The requirements are: password must be 12 characters long; at least 1 character must be alphabetical AND at least 1 character must be a digit OR a non-alphanumeric character; at least 6 characters must occur only once in a password; passwords cannot contain any string that is also contained in the username; and passwords cannot contain any common strings such as a sequential series of letters (abcd) or a sequential series of numbers (1234) or pattern of numbers (2468). Below the requirements, there are three input fields: "Old Password:" (with a masked password of 12 dots), "New Password:", and "Confirm New Password:". At the bottom of the form, there are two buttons: "Continue" (green) and "Cancel" (grey).

8. Users must enter the provided password in the 'Old Password' field.
9. All passwords must be at least 12 characters long and contain characters from 3 of these 4 groups:
  - Lowercase Letters
  - Uppercase Letters
  - Numbers
  - Special Characters: ! # \$ %

At least 6 of those characters may occur only once in the password

Please reference the **Password Rules** section of this document for all password parameters.

**Change Password for User: rpedersen**

Password cannot contain any dictionary words and it must meet the following criterias:

- ✓ Password must be 12 characters long
- ✓ At least 1 character must be alphabetical AND at least 1 character must be a digit OR a non-alphanumeric character
- ✓ At least 6 characters must occur only once in a password
- ✓ Passwords cannot contain any string that is also contained in the username
- ✓ Passwords cannot contain any common strings such as a sequential series of letters (abcd) or a sequential series of numbers (1234) or pattern of numbers (2468)

Old Password:

New Password:  ✓

Confirm New Password:  ✓

AESDirect will validate the password as the User creates it.

**Updating Password...**

**Success:** Your password has been updated.

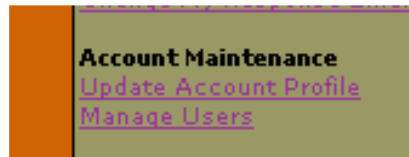
Once updated, the User will have access to your AESDirect Account.

## ***Disable a User***

When a User is no longer responsible for filing EEI in *AESDirect* or leaves your company, you should disable the User. Disabled Users are not removed from *AESDirect* permanently, nor are their EEI. You may reactivate a disabled User at any time.

To disable a User Account

1. Login to *AESDirect*



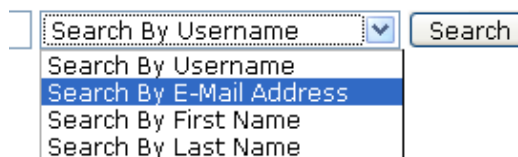
2. Under **Account Maintenance** click 'Manage Users'

The ***AESDirect: Manage Users*** screen will open

3. Search for the User

A screenshot of a web form titled 'AESDirect: Manage Users' in a grey header bar. Below the title, the text 'Search Users:' is followed by a text input field containing the characters 'jsm'. To the right of the input field is a button labeled 'Search'.

- a. Enter at least one character of a search string

A screenshot of a search dropdown menu. On the left is a small square checkbox. To its right is a dropdown menu with a blue border. The menu is currently open, showing a list of search criteria: 'Search By Username' (selected), 'Search By E-Mail Address', 'Search By First Name', and 'Search By Last Name'. To the right of the dropdown menu is a button labeled 'Search'.

- b. Choose how you will 'Search by...'

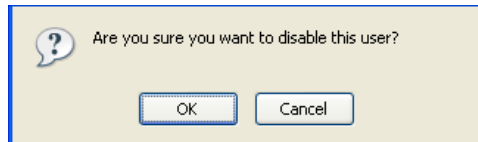
- Username
- E-Mail Address
- First Name
- Last Name

- c. Click 'Search'

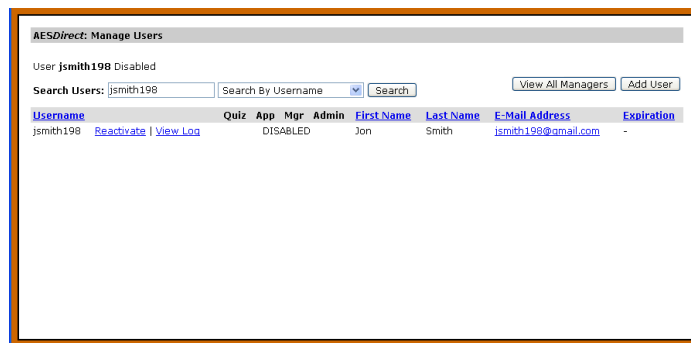
Username			
jsmith198	<a href="#">Edit</a>	<a href="#">Disable</a>	<a href="#">Res</a>
jsmith99	<a href="#">Edit</a>	<a href="#">Disable</a>	<a href="#">Res</a>

A list of matches will be returned.

- Click 'Disable' next to the Username you would like disabled



- A window will open and ask you to confirm
- Click 'OK'



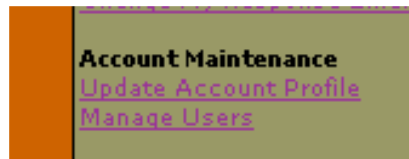
**DISABLED** will appear where a User's permissions are normally indicated.

## ***Reactivate a Disabled User***

Users can be disabled for a number of reasons. If they have left the company, the Account Administrator or User Manager should disable them. Also, if a User has been in-active for more than 30 days, the User will be disabled. When a User is disabled, the User still exists in *AESDirect* and they can be reactivated at any time.

To reactivate a disabled User

1. Login to *AESDirect*



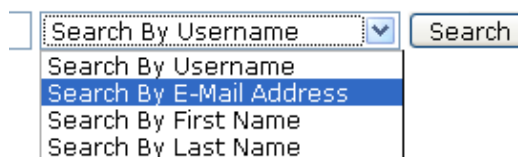
2. Under **Account Maintenance**, click 'Manage Users'

The **AESDirect: Manage Users** screen will open

3. Search for the User

A screenshot of a web application interface. At the top is a grey header bar with the text 'AESDirect: Manage Users' in white. Below the header, the text 'Search Users:' is followed by a text input field containing the characters 'jsm'. To the right of the input field is a button labeled 'Search'.

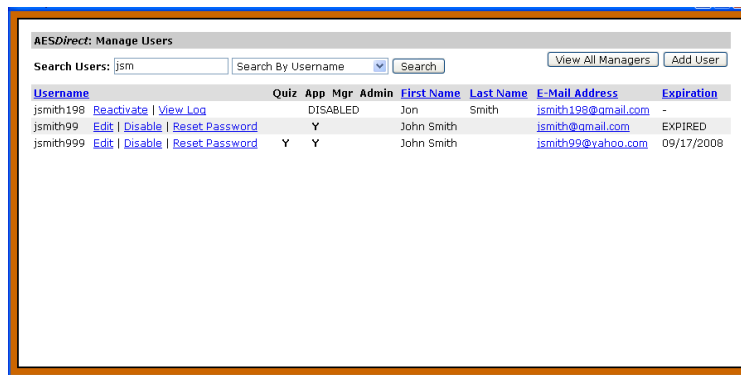
- a. Enter at least one character of a search string

A screenshot of a web application interface showing a dropdown menu. To the left of the dropdown is a small blue square icon. The dropdown menu is open, showing five options: 'Search By Username', 'Search By Username', 'Search By E-Mail Address' (which is highlighted in blue), 'Search By First Name', and 'Search By Last Name'. To the right of the dropdown menu is a button labeled 'Search'.

- b. Choose how you will 'Search by...'

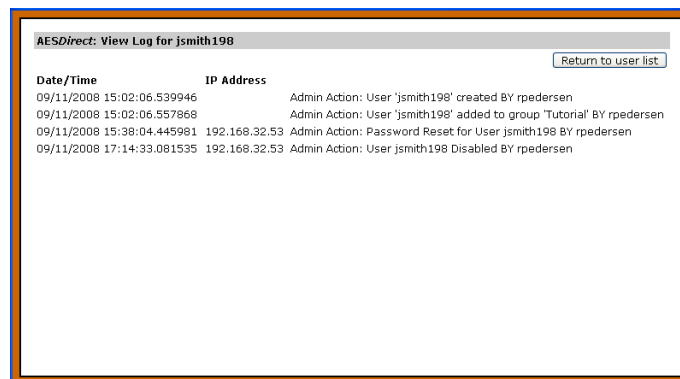
- Username
- E-Mail Address
- First Name
- Last Name

- c. Click 'Search'



A list of matches will be returned. **DISABLED** will appear where a Username's permissions are indicated.

4. If you do not know why the account is disabled click 'View Log'



- a. **View Log** allows you to review the attempts the User or any other individual made to gain access to the account.

Below is the list of messages you may see when you access the **View Log** screen:

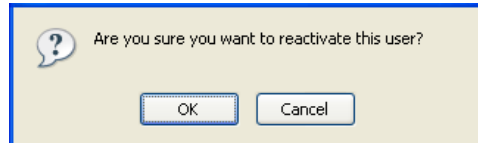
- Failed Login: Account Disabled
- Failed Login: Account Locked Out
- Failed Login: Password Mismatch
- Reset Password: Answer Security Question Failed (Password Recover System)
- System Message: User Account Now Locked Out
- Admin Action: Password Reset for User
- Admin Action: Locked Out User Unlocked
- Admin Action: Disabled User Reactivated
- Password Changed by User

- b. Click 'Return to user list'

Search Users:

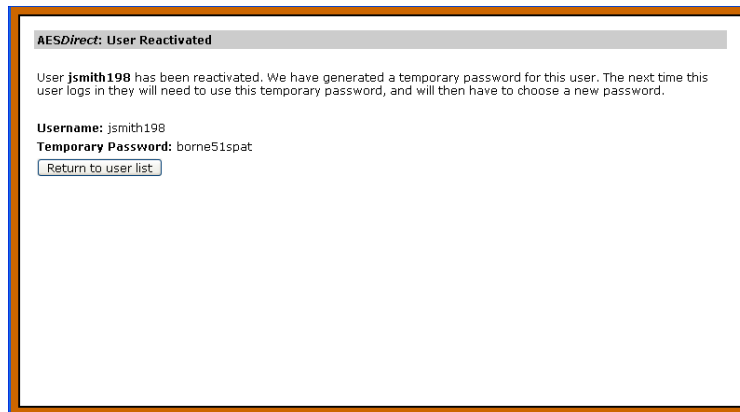
<a href="#">Username</a>	<a href="#">Q</a>
jsmith198	<a href="#">Reactivate</a>   <a href="#">View Log</a>

5. Click 'Reactivate'



A window will open and ask you to confirm

6. Click 'OK'



A new window will open. The Username will be reactivated and a new temporary password will be displayed

7. Deliver this password directly to the User by email or, preferably, telephone.

The screenshot shows the AESDirect login interface. At the top, there are two circular logos: the U.S. Department of Commerce on the left and the AES logo on the right. The title "AESDirect" is prominently displayed in a large, stylized font, with the tagline "Reduce Exporting Stress with AES" underneath it. Below the title, a series of asterisks and the word "WARNING" are repeated. A paragraph of text follows, stating that this is a Census Bureau computer system and that all data is owned by the Census Bureau. It also mentions that the system is monitored and that unauthorized use is a violation of federal law. Another series of asterisks and "WARNING" text is shown. Below this, a section titled "Your Password Has Expired" informs the user that they need to change their password before logging in. It provides two options: "Change Password" to update the password online or "Cancel" to return to the homepage. At the bottom, there are two buttons labeled "Change Password" and "Cancel".

When the User attempts to login, they will be forced to change their password

The screenshot displays the "Change Password for User" form for the user "rpedersen". The form includes a list of password requirements, each preceded by a red 'X' icon, indicating that the current password does not meet these criteria. The requirements are: 12 characters long, at least one alphabetical and one non-alphanumeric character, at least six unique characters, no strings matching the username, and no common sequential strings. Below the list, there are three input fields: "Old Password" (filled with dots), "New Password", and "Confirm New Password". At the bottom, there are "Continue" and "Cancel" buttons.

Users must enter the provided password in the 'Old Password' field.

All passwords must be at least 12 characters long and contain characters from 3 of these 4 groups:

- Lowercase Letters
- Uppercase Letters
- Numbers
- Special Characters: ! # \$ %

At least 6 of those characters may occur only once in the password

Please reference the **Password Rules** of this document for all password parameters.

**Change Password for User: rpedersen**

Password cannot contain any dictionary words and it must meet the following criterias:

- ✓ Password must be 12 characters long
- ✓ At least 1 character must be alphabetical AND at least 1 character must be a digit OR a non-alphanumeric character
- ✓ At least 6 characters must occur only once in a password
- ✓ Passwords cannot contain any string that is also contained in the username
- ✓ Passwords cannot contain any common strings such as a sequential series of letters (abcd) or a sequential series of numbers (1234) or pattern of numbers (2468)

Old Password:

New Password:  ✓

Confirm New Password:  ✓

AESDirect will validate the password as the User creates it.

**Updating Password...**

Success: Your password has been updated.

## Reactivate a Locked Out User

Users who attempt to log in to AESDirect with their Username but make 5 consecutive invalid attempts within 15 minutes will, as a security precaution, be locked out.

**\*\*WARNING\*\*WARNING\*\*WARNING\*\*WARNING\*\*WARNING\*\***

Enter your username and password and click **Continue**

[Home](#) [Who is My Administrator?](#)  
[Need Help?](#) [Forgot Your Password?](#)

Username:

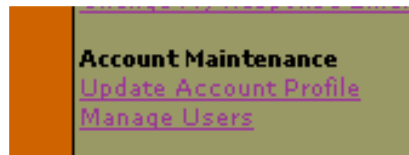
Password:

**No user account found for the username and password entered**

*Please remember that passwords are case sensitive. For users that have upgraded to the new account administration tools, 5 consecutive invalid login attempts will result in your username being locked out. Contact your Account Administrator or a User Manager if you need assistance or reset your password by using the "Forgot your password?" link above.*

It is the responsibility of the Account Administrator or the User Manager to reactivate Locked-Out Users. Users can only be unlocked following a 15 minute 'time out.'

1. Login to AESDirect



2. Under **Account Maintenance**, click 'Manage Users'

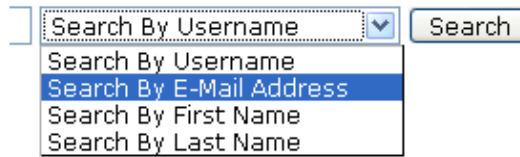
The **AESDirect: Manage Users** screen will open

3. Search for the User

**AESDirect: Manage Users**

Search Users:

- a. Enter at least one character of a search string



b. Choose how you will 'Search by...'

- Username
- E-Mail Address
- First Name
- Last Name

c. Click 'Search'

AESDirect: Manage Users

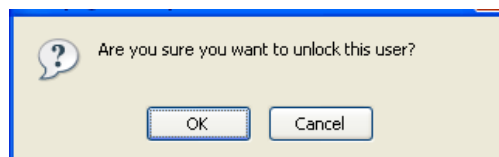
Search Users:

Search By Username

Username		Quiz	App	Mgr	Admin	First Name	Last Name	E-Mail Address	Expiration
jsmith198	<a href="#">Reactivate</a>   <a href="#">View Log</a>					Jon	Smith	<a href="mailto:jsmith198@gmail.com">jsmith198@gmail.com</a>	-
jsmith99	<a href="#">Edit</a>   <a href="#">Disable</a>   <a href="#">Reset Password</a>				Y	John	Smith	<a href="mailto:jsmith@gmail.com">jsmith@gmail.com</a>	EXPIRED
jsmith999	<a href="#">Edit</a>   <a href="#">Disable</a>   <a href="#">Reset Password</a>	Y	Y			John	Smith	<a href="mailto:jsmith99@yahoo.com">jsmith99@yahoo.com</a>	09/17/2008

A list of matches will be returned. **Locked Out** will appear where a Username's permissions are indicated.

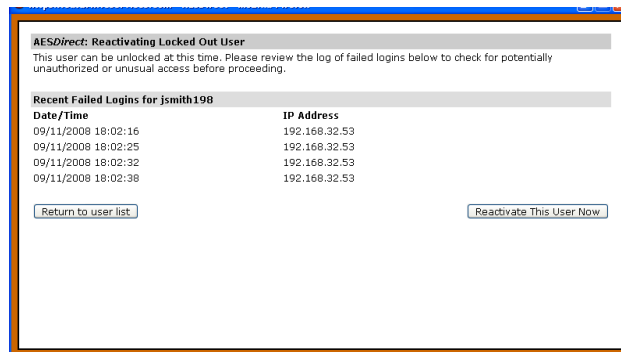
4. Click 'Reactivate'



A window will open and ask you to confirm

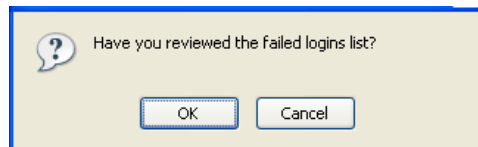
5. Click 'OK'

The **AESDirect: Reactivating Locked Out User** screen will open and display all recent attempts to login. You will only be able to reactivate this User if it has been 15 minutes since the last failed attempt.

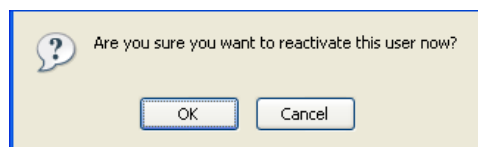


**Recent Failed Logins** lets you to review the number of attempts the User or any other individual made to try to gain access to the account. If the number of attempts is significantly more than the five that would result in a lockout, your AESDirect Account may be subject to a malicious attack. If you suspect you are the victim of an attack, contact AESDirect Technical Support immediately.

6. Review the log in attempts again to identify any abnormalities
7. If all seems right, click 'Reactivate This User Now'

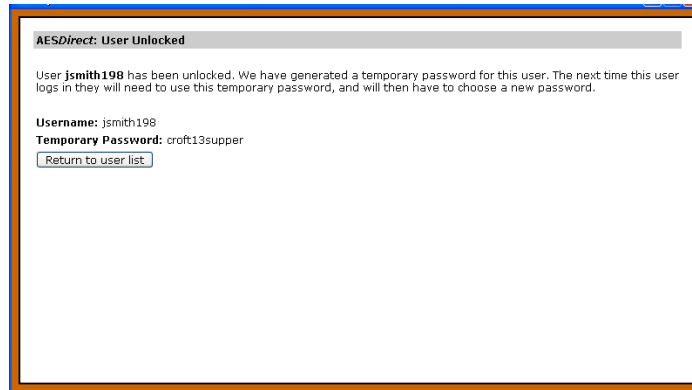


8. A window will open and ask you to confirm you have reviewed the failed Logins list
9. Click 'OK'



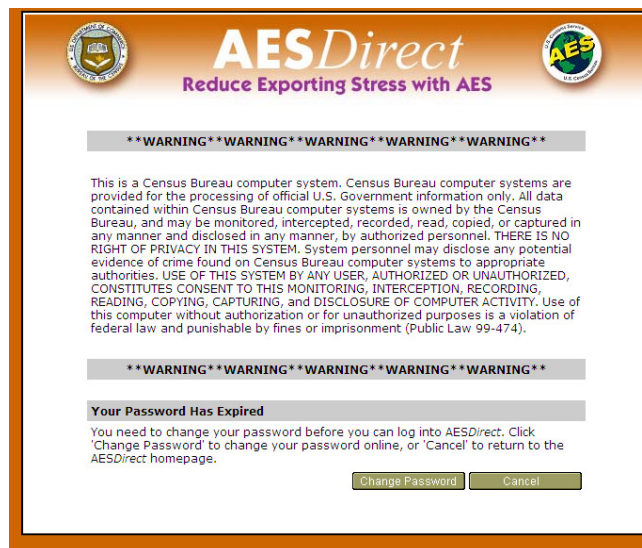
Another window will open and ask if you are sure you would like to reactivate the User.

10. Click 'OK'



A new window will open. The password will be reset and a new temporary password displayed

11. Deliver this password directly to the User.



When the User next logs in to their account, they will be forced to change their password

**Change Password for User: rpedersen**

Password cannot contain any dictionary words and it must meet the following criterias:

- ✗ Password must be 12 characters long
- ✗ At least 1 character must be alphabetical AND at least 1 character must be a digit OR a non-alphanumeric character
- ✗ At least 6 characters must occur only once in a password
- ✗ Passwords cannot contain any string that is also contained in the username
- ✗ Passwords cannot contain any common strings such as a sequential series of letters (abcd) or a sequential series of numbers (1234) or pattern of numbers (2468)

Old Password:

New Password:

Confirm New Password:

Users must enter the provided password in the ‘Old Password’ field.

All passwords must be at least 12 characters long and contain characters from 3 of these 4 groups:

- Lowercase Letters
- Uppercase Letters
- Numbers
- Special Characters: ! # \$ %

At least 6 of those characters may occur only once in the password

Please reference the **Password Rules** section of this document for all password parameters.

**Change Password for User: rpedersen**

Password cannot contain any dictionary words and it must meet the following criterias:

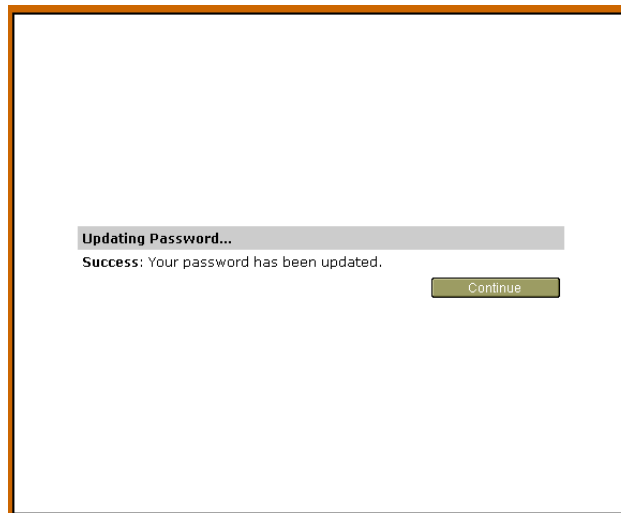
- ✓ Password must be 12 characters long
- ✓ At least 1 character must be alphabetical AND at least 1 character must be a digit OR a non-alphanumeric character
- ✓ At least 6 characters must occur only once in a password
- ✓ Passwords cannot contain any string that is also contained in the username
- ✓ Passwords cannot contain any common strings such as a sequential series of letters (abcd) or a sequential series of numbers (1234) or pattern of numbers (2468)

Old Password:

New Password:  ✓

Confirm New Password:  ✓

AESDirect will validate the password as the User creates it.



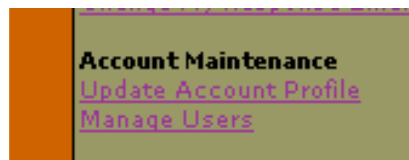
Once updated, the User will have access to your AESDirect Account.

## ***Change an Account Administrator***

As with all Users, when the Account Administrator leaves, their account will need to be disabled. Unlike Users or User Managers, your company must take additional measures identify a new Account Administrator in *AESDirect*, as they are the individual directly responsible for *AESDirect* maintenance.

To Change an Account Administrator...

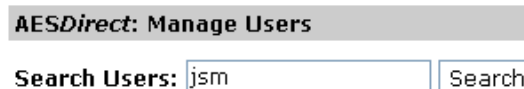
1. Login to *AESDirect*



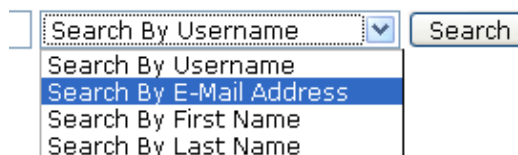
2. Under **Account Maintenance**, click 'Manage Users'

The **AESDirect: Manage Users** screen will open

3. Search for the User

A screenshot of a web application interface. At the top is a grey header bar with the text 'AESDirect: Manage Users' in bold. Below the header, the text 'Search Users:' is followed by a text input field containing the characters 'jsm'. To the right of the input field is a button labeled 'Search'.

- a. Enter at least one character of a search string

A screenshot of a web application interface showing a dropdown menu. To the left of the dropdown is a small square checkbox. The dropdown menu itself has a header 'Search By Username' with a downward arrow. Below the header, there are four options: 'Search By Username', 'Search By E-Mail Address' (which is highlighted with a blue background), 'Search By First Name', and 'Search By Last Name'. To the right of the dropdown menu is a button labeled 'Search'.

- b. Choose how you will 'Search by...'

- Username
- E-Mail Address
- First Name
- Last Name

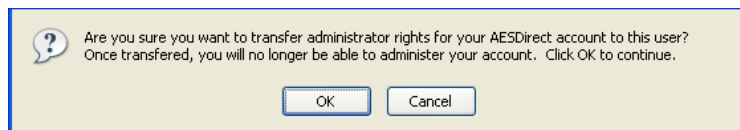
- c. Click 'Search'

A list of matches will be returned.

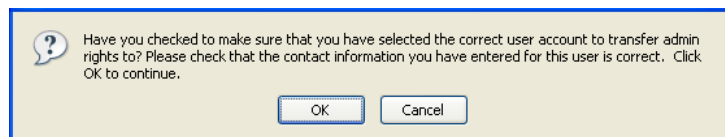
4. Click 'Edit' next to the User you would like to make the Account Administrator
5. Click 'Transfer Account Administrator Role to This User'

The **AESDirect: Transfer Account Admin** window will open.

6. Complete any profile information that may be missing. All fields must be completed.
7. Click 'Transfer Account Administration'

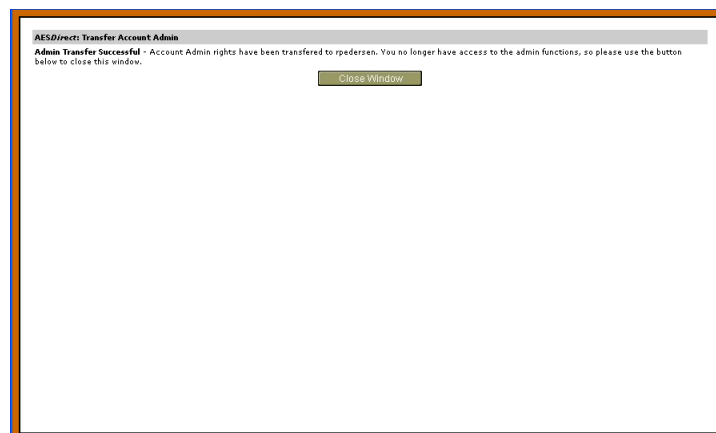


8. You will be asked to confirm the change of Account Administrator a first time
9. Click 'OK'



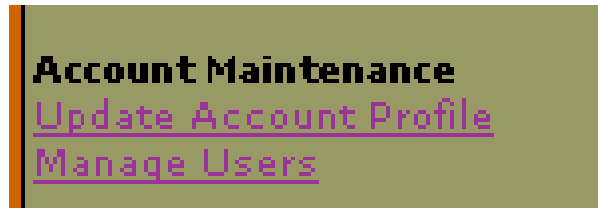
You will be asked to confirm the change of Account Administrator a second time

10. Click 'OK'



You will see **Admin Transfer Successful** if there are no problems. Account Administrator privileges will transfer to the selected User. You will no longer be an Account Administrator.

11. Check on the Status of your changes.



12. Under **Account Maintenance**, click 'Update Account Profile'

The new Account Administrator contact information should be listed.

## WHAT HAPPENS IF THE ACCOUNT ADMINISTRATOR LEAVES?

If the User designated as an Account Administrator leaves the company and does not nominate a replacement Account Administrator before their password expires, there are manual steps you can take to have a new Account Administrator nominated.

FAX the Technical Request Form to **Fax # (301) 562-7795**

The form is available here:

<http://aesdirect.census.gov/support/AESDirectTechnicalAssistanceFaxForm.pdf>

This request must come from an authorized company officer (President, CEO, etc.) and signed by that company officer. The letter must specifically request that you wish to nominate a new Account Administrator as the one on file is no longer employed by the company.

Include the following:

- Company Name
  - Company ID Number (EIN, SSN, or DUNS)
  - *AESDirect* Username. Either
    - New Username you wish to be created; or
    - Existing Username
  - The new administrator information:
    - Name
    - Phone Number
    - Fax Number
    - E-Mail Address
    - Mailing Address
  - Signature & Title of the person requesting the change
1. Once we have received your fax, we will contact the new Account Administrator and provide a Username, if new, and a Password.
  2. The New Account Administrator must login. They will be forced to reset their password

All passwords at least 12 characters long and contain characters from 3 of these 4 groups

- Lowercase Letters
- Uppercase Letters
- Numbers
- Special Characters: ! # \$ %

Please reference the **Password Rules** section of this document for all password parameters.

3. Under Account Maintenance, click 'Update Account Profile' to verify your information is correct.